What's New in

CGM webPRACTICE™ v2025.3.0

Preliminary Release Notes

August 05, 2025

CGM webPRACTICE

Table of Contents

INTRODUCTION

This document provides an overview of new features, resolutions, and enhancements available in the release of CGM webPRACTICE v2025.3.0. Each section defines the specific feature and/or enhancement associated with the new CGM webPRACTICE release, as well as any resolved issues.

NEW FEATURES AND ENHANCEMENTS

This section is not meant to be cumulative and only contains information associated with the CGM webPRACTICE v2025.3.0 release.

> **Note**: You will need to complete the *****Action Required***** items (where applicable) to make sure your system functions properly with this updated version.
>
> As with all updates, for all new menu functionality, you will need to identify which users you want to have access to the new menu functions. Then, you must activate the new menus using the *Model User Menus* function located on the *System, User Management* menu. You must also set the security level that you want on the new menus using the *Change Function Security* function located on the *System, User Management, Function Security Menu*.

Summary of Action Required Items

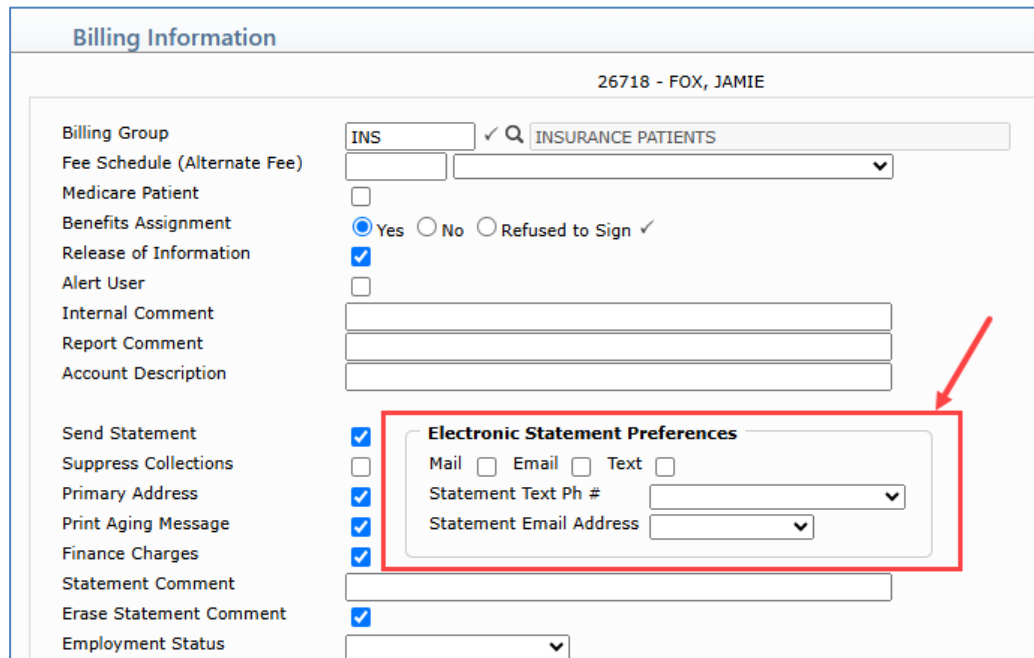| Page #	Function	Action

Summary of Changes to Document

Preliminary Release Notes to be released August 5, 2025.

Section	Function	Added/Deleted/Revised

Patient

Billing Information *(Patient > Patient Registration – Billing and Patient > Change Patient Data - Billing)*
Now that eMEDIX is offering text and email service for electronic patient statements, new fields have
been added so you can start saving your patients' preferences.

- **Mail, Email, Text***: Specifies the patient's preferred method of receiving electronic statements.
- **Statement Text Ph** *#: Phone number to be used when statements are sent via text message.
- **Statement Email Address***: Email address to be used when statements are sent via email.

Only the options enabled in the *Electronic Pt Stmts Integration* are available to be selected on this screen.
If the database is not activated for Electronic Statements, all the Electronic Statement Preferences are
disabled. If the database is activated for Standard Electronic statements, patient accounts are
automatically set to **Mail** only.

For additional information, see the *Electronic Pt Stmts Integration* note in the *System* section of these
release notes.

> **Note**: You will need to contact your account representative to sign up for the new Email and Text
> options.

Schedule

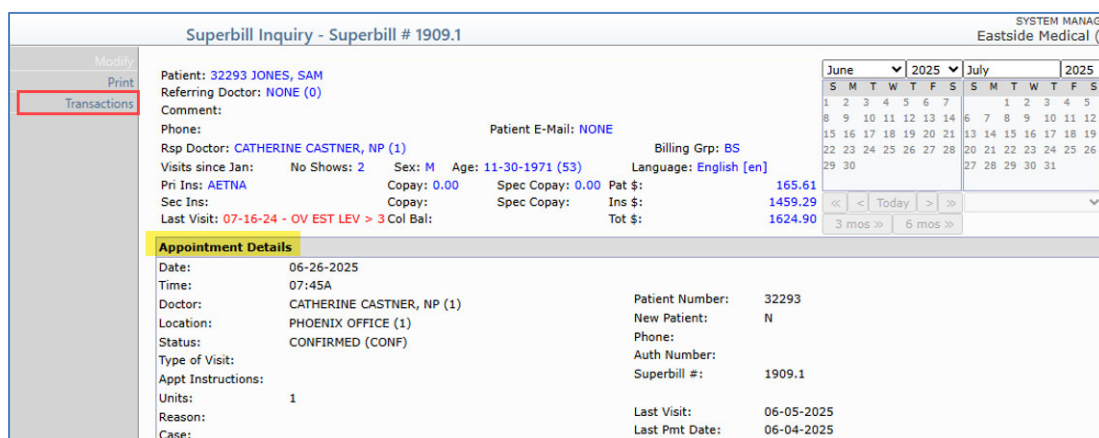**Superbill Inquiry** *(Schedule > Superbill Inquiry)*

The searching logic has been enhanced to resolve the following issues:

- When searching by **Begins with** or **Contains**, the search would not always find the correct results.
- When using the **Filter** in *Unposted Procedures*, the system would not correctly process the data entered in the **From Superbill** and **Through Superbill** fields.

The functionality for displaying the results varies for the search options and is explained in detail below:

Searching by 'Equals':

If you search by **Equals** and the Superbill Number **IS** tied to an appointment, the *Appointment Details* screen will display. If there are any associated transactions for the superbill, the **Transactions** Action Column button will be active, otherwise it will be disabled if there are not any associated transactions. For example: Superbill Number 1909.1 is tied to an appointment and it does have transactions associated with it.

When you click the **Transactions** Action Column button, the status of the transactions will be displayed. They will either be *Posted* or *Unposted*. If the superbill is NOT tied to an appointment, the following results screen will display.

If the transaction status is posted and you click on the row, the patient's *Transaction History* filtered for that superbill number will display. If the transaction status is unposted, *Unposted Procedures* filtered for the superbill number will display.

Schedule (cont.)

Superbill Inquiry - Unposted Procedures   Eastside Medical (1)

There are (3) Un-registered New Patients with (2) charges waiting to be posted.
*** Filter Applied ***
(Superbill *1909.1 - 1909.1*)

Sta	Source	Account ▼	Patient Name	Superbill	DOS	CPT	Procedure Description	Billing Group
○	E-Superbill	32293	JONES, SAM	1909.1	06-26-25	36415	ROUTINE VENIPUNCTURE	BS
			One or more Authorization attachments may be required.					

Searching by 'Begins with' or 'Contains':

Searching by 'Begins with' will find any superbills that begin with the value typed in the **Superbill Number** field. For example, if you search for 'S', it will find any superbill numbers that start with 'S'. Searching by 'Contains' finds any superbill numbers that contain the value typed in the **Superbill Number** field. For example, if you search for '2921', it will find any superbill numbers that contain '2921'.

The search results functionality for both **Begins with** and **Contains** behaves the same way. The examples below are for the 'Begins with' search when you search for all superbills that begin with 'S'.

Superbill Inquiry

Superbill Number	S
Search By	○ Equals ● Begins with ○ Contains ✓

The search results will list all the superbills found and include one of four possible statuses:

- **Posted** - There are transactions associated with the superbill number posted to the account.
- **Unposted** - There are unposted transactions associated with the superbill.
- **Unposted - New Patient** - There are unposted transactions associated with the superbill attached to a New Patient.
- **No Transactions** - There are no Transactions associated with the superbill.

Superbill Inquiry - Superbill # Begins with 'S'   Eastside Medical (1)

Status ▼	Superbill #	Account #	Patient	DOS	CPT	Amount	Per Dr	Ins Dr	Ref Dr	Loc
Posted	S22-2922	32293	JONES, SAM	06-05-2025	36415	13.00	1	1	22	1
Unposted	S25-2921	32293	JONES, SAM	06-05-2025	36415	13.00	1		22	1
Unposted - New Patient	S24-2923		JORDAN, FELIX	06-26-2025	36415	13.00	1	1	0	GSI
Unposted - New Patient	S24-2923		JORDAN, FELIX	06-26-2025	99213	71.50	1	1	0	GSI

If any of the superbills are tied to an appointment, the *Appointment Details* screen will display first when you click on a row. Then if there are transactions associated with the superbill you can click on the **Transactions** Action Column button and either the patient's *Transaction History* or *Unposted Procedures* will display.

Schedule (cont.)

Whether you click the **Transactions** Action Column button from the *Appointment Details* screen or if you click the superbill row on the search results screen (*when the superbill is not tied to an appointment*), the following action will take place for each status:

Posted – The patient's Transaction History will display filtered for that superbill number.

Unposted - *Unposted Procedures* will display filtered for the superbill number.

Unposted – New Patient- *Unposted Procedures* will display filtered for the superbill number.
Click the superbill row for Jordan, Felix.

Click the **New Patients** Action Column button.

Schedule (cont.)

Select the patient associated with the superbill number.

	Un-Registered Patients							Eastside Medical (1)
Refresh	Patient Name ▼	SSN	Date of Birth	Sex	Dr	Loc	Source	Unposted Procedures
Print	JORDAN, FELIX		06-14-1960	A	1	GSI	CGM webMOBILE	2
	MAYNARD,		-1984	M	1	1	PR	0
	Shah,	.	-2002	M	PQN	4	LE	0

No Transactions – The *Appointment Details* screen will display if the superbill number is tied to an appointment otherwise a message stating '*No appointment or posted/unposted procedures exist for Superbill ####*'.

Missing Charge Report *(Schedule > Scheduling Printing Menu > Missing Charge Report)*

A new **Include No Shows** check box has been added, so you now have the option to select if you want No Show charges associated with appointments to be included or not when determining if there is a missing charge for an appointment.

- If you select this check box, appointments with No Show charges posted to the account will be included when the patient's charges are analyzed, and they will not be printed on the report.
- If you do not select the check box, No Show charges are not included when the patient's charges are analyzed and will be printed on the report.

Missing Charge Report

Begin with Doctor Code	
End with Doctor Code	
Begin with Location	
End with Location	
Begin with Type of Visit	
End with Type of Visit	
Begin with Date	06-01-2025
End with Date	06-03-2025
Include Unposted Procedures	☑
Match on Location Code	☐
Match on Type of Service	☑
Include No Shows	☑

Schedule (cont.)

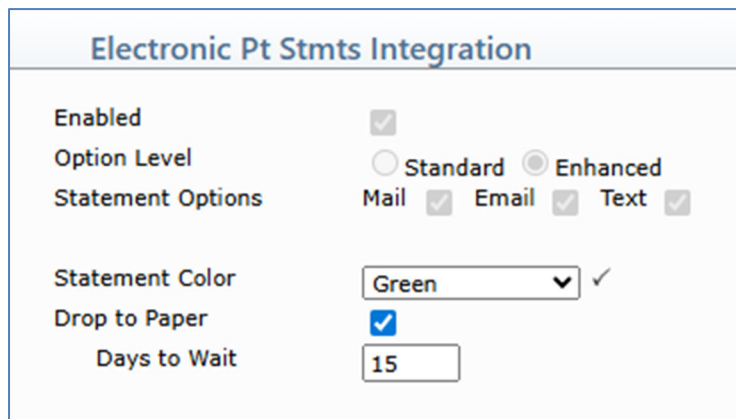**Check In/Out Payment Journal** *(Schedule > Scheduling Printing Menu)*

The following improvements were made to the report:

- o Changed the **Date** column heading to **Pmt Date**
- o Added the option to **Print by Pmt Method**
- o Fixed **CGM PAY Pmt ID** so it would only print if it was a valid CGM PAY Payment ID
- o Fixed **Totals** and **Grand Totals** to truncate the device name to fit the page when printing the non-Excel versions
- o Changed the **Pmt** column heading to **Pmt Code** when printing to Excel

System

Electronic Pt Stmts Integration *(System > Database Maintenance Menu > Integrations > Electronic Pt Stmts Integration)*

This new function has been added to track whether electronic patient statements have been activated in your system. The **Option Level** in this function has been automatically set to **Standard** (with **Mail** selected) in each database that has been activated in the past.

In addition, **Enhanced** options will be available after the v2025.3.0 update has been installed.

- **Email** and **Text** - You can send statements to patients via Email and/or Text
- **Statement Color –** You can select the color you want. The default color is Blue. The other color options are Green, Red, or Black and White.
- **Drop to Paper** and **Days to Wait** - You can select to have statements dropped to paper after they were sent by Email and/or Text and specify the number of days to wait. The **Days to Wait** field is required if **Drop to Paper** is selected.

For additional information, see the *Billing Information* note in the *Patient* section of these release notes.

> **Note**: You will need to contact your account representative to sign up for the new Email and Text options.

Tables

Maintain Insurance Carriers *(Tables > Insurance Carrier Table > Maintain Insurance Carriers)*

The pop-up message for the **Insurance Carrier Code** field has always stated that codes could not begin with a zero, but recently it was found that codes could be saved that begin with a starting zero, so the message has been corrected.

Before:

Insurance Carrier Code: Type the code you want or click the magnifying glass to search the table. This code cannot begin with a zero or contain quotes.

After:

Insurance Carrier Code: Type the code you want or click the magnifying glass to search the table. This code cannot contain quotes.

Transactions

Unposted Procedures - Filter *(Transactions > Unposted Procedures)*

The **Department** field has been changed to a multi-select list and the following options have been added:

- **Source** – Filters by E-Superbill, Procedure Entry, Interfaces, etc.
- **Amount** – Filters by procedure amount.
- **CPT** – If entered, only encounters with a procedure code matching the CPT are displayed.
- **ICD-10** – If entered, only encounters with a diagnosis code matching the ICD-10 entered are displayed.
- **Referring Dr** – Filters by Referring Dr.
- **Entered By** – Filters by the user who entered or Stored the encounter.
- **Fee Schedule** – Filters by Fee Schedule.
- **Case Type** – Filters by Case Type.

Unposted Procedures *(Transactions > Unposted Procedures)*

The **Batch Number** will now display at the top of the screen if one is selected.

Transactions (cont.)

Transaction Details to Excel *(Reports > Transaction Journals > Transaction Details to Excel)*

Added the following Data Element:

- Proc-Date of Ill/Inj/Lmp (T9.28a) - This date is pulled from the 'Case' that is tied to the procedure.

Interface Charge Reconciliation Report *(Transactions > Transaction Journals > Interface Charge Reconciliation Report)*

Enhancements were made to the report to indicate if changes were deleted from *Unposted Transactions* or from *Unregistered New Patients*.

```
05-21-2025                          EASTSIDE MEDICAL                         Page 1
                              Interface Reconciliation Report
                             Interface ID 0001F - Inbound Testing
                         Messages Received From 05-20-2025 Through 05-21-2025

Pt  Msg Date   MessageID       CPT    Service Date  Superbill  Interface Action        PM System Results
--------------------------------------------------------------------------------------------------------
WHITE, SALLY A (64 Temporary New Pt)
    05-20-2025  54-6           82947  01-07-2025               Stored as Temp New Pt   In Unposted Transactions
WHITE, SALLY A (26885)
    05-20-2025  54-6           82947  01-07-2025               In Unposted Transactions   Deleted from Unposted Trans
Grays, Robert J ()
    05-20-2025  SC24-25        82947  01-06-2025               Duplicate MessageID
    05-20-2025  SC24-25                                        Message Failed - Unidentifie ** Charge not Found **
BLUE, HARRY A (63 Temporary New Pt)
    05-20-2025  54-6           82947  01-07-2025               Stored as Temp New Pt   Charge deleted from New Pt
    05-20-2025  54-6           82947  01-07-2025               Stored as Temp New Pt   Charge deleted from New Pt
Brown, Robert J (62 Temporary New Pt)
    05-20-2025  SC24-25        82947  01-06-2025               Stored as Temp New Pt   In Unposted - New Patient

End of Report.   Transactions/Journals/Interface Charge Reconciliation Report
Requested by MARS and completed at 10:24AM on May 21 2025
```

Unposted Payments Journal *(Transactions > Transaction Journals > Unposted Payments Journal)*

Previously this report only printed the transactions 'currently' in *Unposted Payments* and not the 'Journal' of all the transactions (posted/unposted/voided) and this has been corrected. The option to **Print by Pmt Method** was also added.
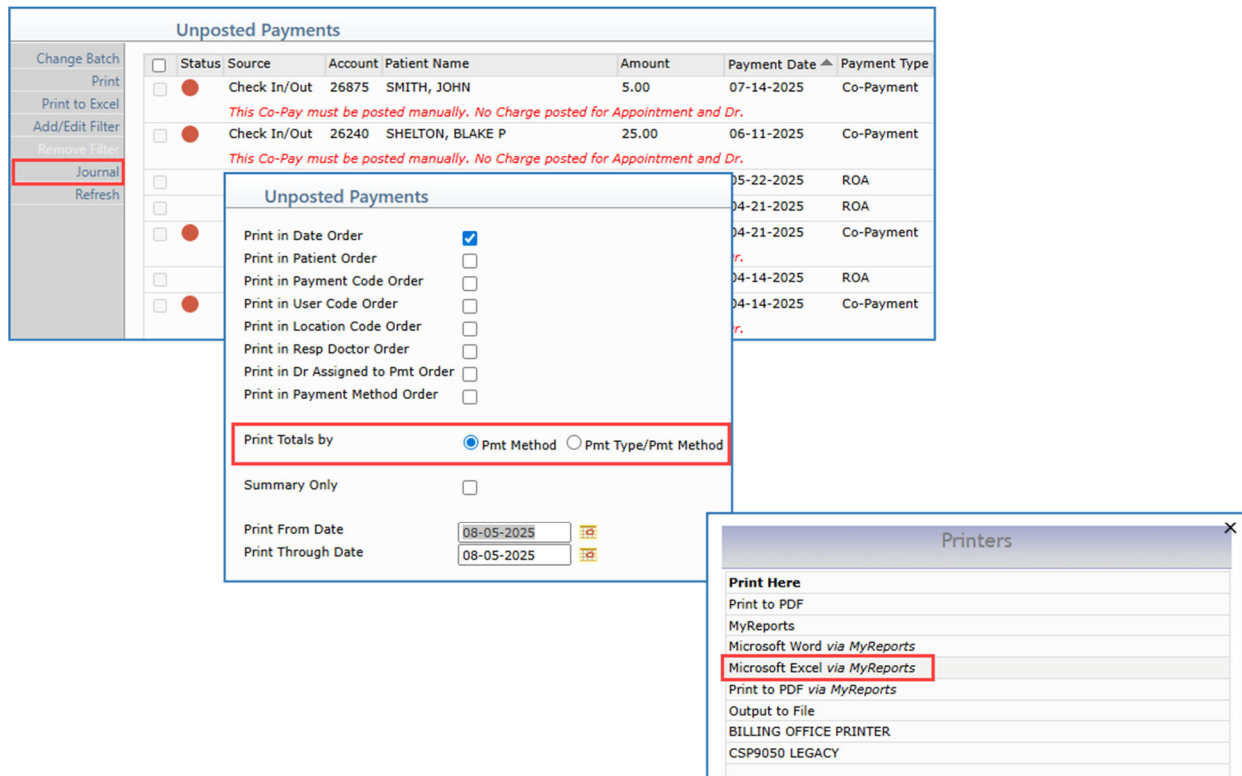
Unposted Payments Report *(Transactions > Transaction Journals > Unposted Payments Report)*

This new report will print the transactions that are currently stored in the *Unposted Payments* function.

Transactions (cont.)

Unposted Payments - Journal *(Transactions > Unposted Payments)*

Previously the **Journal** Action Column button was only printing the transactions 'currently' in *Unposted Payments* and not the 'Journal' of all the transactions (posted/unposted/voided) and this has been corrected. The option to **Print by Pmt Method** was also added and you can print the **Journal** to Excel now.

If you want to print a report of the transactions 'currently' in *Unposted Payments,* you must use the **Print to Excel** Action Column button.

CGM webTOOLS

Direct Scanning

The Dynamsoft software has been updated from version 17.3 to version 19.1. Updated installation instructions have been uploaded to CGM webPRACTICE Help (*Knowledge Tree > Implementation Documents*).

Invoice Billing

Invoice Billing Integration *(System > Database Maintenance Menu > Integrations > Invoice Billing Integration)*

Added a new **Do Not Add NF Modifier for Patient Bill Types** check box, so you can select whether you want NF modifiers added to charges or not when the **Bill Type** comes over in the interface as **Patient**. For additional information, see the *Unposted Procedures* note.

Unposted Procedures *(Transactions > Unposted Procedures)*

When NF Modifiers are added to charges, any existing modifiers received from the interface will be preserved and the NF modifier will be added to the list. For additional information, see the *Invoice Billing Integration* note.

Invoice Billing (cont.)

Invoice Management – Print to Excel *(Billing > Invoice Management)*

A **Print to Excel** Action Column button has been added, so you can print individual invoices to Excel. After you use *Generate/Print Pt Statements* to assign Invoice #'s, you can access the *Invoice Management* function to select the invoice you want to print and the **Print to Excel** Action Column button will display.

All transactions for the Invoice will print on a single sheet in Excel (*even if the invoice displays in Invoice Management on multiple pages*). The 'current view' of the invoice will print, regardless of the view currently displayed on the screen. **Note**: The Excel invoice will not include Payments/Credits, Balance Aging amounts, or Statement comments. You will need to manually apply any text or column formatting you prefer to use.

	A	B	C	D	E	F	G
1				INVOICE			
2	EASTSIDE MEDICAL					Prepared:	7/31/2025
3	3838 N Central Ave Ste 1600					Account #:	26850
4	Phoenix, AZ 85012-1950					Invoice #:	072025.230
5	208-555-0172					PO#:	PO20250731MGR
6							
7	FLOWERS INTERNATIONAL						
8	1234 ROSE LAND						
9	Phoenix AZ 85026						
10					Employer: PETUNIA'S FLOWER SHOP		
11	Pt/Employee	Date of Service	Collected At	Superbill #	Procedure	Description	Charge
12	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		80053	COMPREHEN METABOLIC	$ 25.00
13	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		85025	AUTOMATED HEMOGRAM	$ 10.00
14	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		80061	LIPID PANEL BLOOD TEST	$ 162.50
15	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		83036	GLYCATED HEMOGLOBIN	$ 31.46
16	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		80202	ASSAY OF VANCOMYCIN	$ 20.00
17	FLOWER, ROSE (Acct # 26724)	7/31/2025	MAIN OFFICE		G0471	VEN BLOOD COLL SNF/H	$ 5.00
18						Total:	$ 253.96
19					Employer: RUBY'S FLOWERS		
20	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		80053	COMPREHEN METABOLIC	$ 15.00
21	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		85025	AUTOMATED HEMOGRAM	$ 9.00
22	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		80061	LIPID PANEL BLOOD TEST	$ 162.50
23	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		85651	RBC SED RATE NONAUT	$ 10.00
24	FLOWER, FREESIA (Acct # 26726)	7/31/2025	MAIN OFFICE		83036	GLYCATED HEMOGLOBIN	$ 31.46
25						Total:	$ 227.96
26	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		80164	ASSAY DIPROPYLACETI	$ 15.00
27	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		85025	AUTOMATED HEMOGRAM	$ 9.00
28						Total:	$ 24.00
29							
30						Patient Subtotal:	$ 505.92
31							
32	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		STAT	26727-FLOWER, PANSY	$ 25.00
33	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		STAT	26726-FLOWER, FREESIA	$ 25.00
34	FLOWER, PANSY (Acct # 26727)	7/31/2025	MAIN OFFICE		STAT	26724-FLOWER, ROSE	$ 25.00
35						Special Fees Subtotal:	$ 75.00
36							
37						Total:	$ 580.92
38							
39							